RUNNING A DEPARTMENTAL RETREAT

a few tips from Karen Holl

Background: When I took over as department chair, there was a lot of interest in having a full-department discussion regarding strategic planning, and it was the year before we had to draft our external review self-study, so a retreat seemed timely. In the process, I learned a lot about the nuts and bolts of making meetings/retreats run most efficiently that I thought might be of interest to others. I was impressed how much we were able to get done in 1.5 days (the most I thought I could get my faculty to set aside in their schedule). Below are a list of tips that worked well for me, some of which I continue to use in running departmental meetings.

Before the retreat:

- *Make sure you're clear on what questions you want answered or information you want when you leave the retreat/meeting and design activities/discussions to that end with clear guidance on how to proceed on these issues.* This sounds obvious, but I've see many instances when discussions go on for a long time without answering the desired question. When I thought through the most important questions for which I needed a group answer, it helped me narrow down my agenda considerably.
- *Work with somebody with experience on planning the agenda.* I did not use a moderator/facilitator at the retreat because my department is collegial and because of the cost. But, spending a few 1-hr sessions with an experienced moderator to help me clarify my priorities, suggest tips on how to structure discussions, and work out the timing was invaluable. I also got feedback from a few colleagues on the agenda, but consulting with the moderator/meeting planner was essential to the success of our retreat.
- *Have a detailed agenda with clear and realistic timing*.
- *Make sure you have assigned people for all roles* (e.g. leading sessions or break out groups, note taking, discussant) *and given them detailed instructions on your expectations*.

Practical tips to use your time most efficiently:

- *Minimize the amount of full group discussion time*. List making and break out groups are much more efficient to get things done and allow more people to be actively involved. Kaner (2007) discusses different ways to structure discussions to use time efficiently and make sure you get to the endpoint you want. We started our retreat with a full "go around" where each faculty member had a chance to talk about their "vision for the department" for 3 min; after that we used a variety of discussion structures which kept things moving and people engaged.
- *Lists, sticky dots, and post it notes.* We had several different topical areas that we needed to cover in a 1.5 days. The first afternoon we had various lists (e.g. future faculty hires, graduate and undergraduate program issues) on large lined paper on the walls and gave people time to circulate through the room and write down ideas. Then people had a chance to use post-it notes to comment on others' ideas. Finally, everybody got three sticky dots for each sheet; they could put one each on three topics or three on one topic. I was impressed how effective the sticky dots were in reducing a long-list (which would have taken hours to discuss) down to a few points on which we could focus our discussions the next day. We didn't have to spend time on one person's pet issue when it wasn't a shared concern. The whole process took 2.5 hr to make and narrow down several lists.

- *Have a discussant summarize each session.* We assigned a person to take 5 min at the end of each session to discuss (1) two to three consensus points, (2) two to three highest priorities for future discussion, and (3) a few other important notes. This left us with clear take home messages, as well as priority items for subgroups to discuss over the coming year.
- *Have a designated note-taker and photograph charts/list with a digital camera.* Having detailed notes and charts all in one place made it easy for me to revisit the take-home points from the retreat in drafting our self-study and following up on discussions.
- *Set time limits and use timing devices.* We bought large colored sand timers which were unobtrusive but made sure folks didn't ramble.

Other meeting/retreat tips:

- *Set clear ground rules.* We were in the middle of major budget cuts (we still are) so I figured there would be a lot of negativity at the retreat. At the outset, I asked folks to put that aside and be visionary, and I was impressed how much people did this. I also laid the ground rules on timing and not interrupting, as well as not checking email and phones.
- *Leave retreat with a timeline and topics that need to be addressed over the coming year.* In our last session we looked over lists of priority items, along with timelines for completing these, and these lists provided an excellent guide for the following year.
- *Include some down time.* The social time is incredibly valuable for team building and collegiality. My faculty voted to spend the night (even though the retreat location was only 20 min. from campus). Staying over was important to have more informal time to interact.
- *Get feedback at the end of each day.* We had a 5 min. feedback session at the end of the first day to make sure things were on track and make needed corrections.
- *Have a spreadsheet of all participants' names to use in queuing people up to speak next.* I now use a spreadsheet like this at all faculty meetings and can quickly write down what number they are in line to speak so I don't lose track. It also helps in tracking who has or has not spoken on a topic.
- *Use a "gradients of agreement" voting tool.* When it seems like a group is having difficulty coming to a consensus, I have found that using a voting system like the one below (see Kaner 2007 for more details) can quickly help to sort out how much more additional discussion is needed and works better than a straight yes or no vote.

1	2	3	4	5	6	7
I strongly support it.	I support it.	I support it with reservations.	I am indifferent.	I don't like it but I won't stand in the way.	I strongly disagree with it.	I think it needs more discussion.

A great resource: Kaner, S. 2007. Facilitator's Guide to Participatory Decision-Making. John Wiley & Sons. – *has lots of great tips on running meetings to facilitate decision making*